DOCUMENT RESUME

ED 284 555 IR 052 021

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TITLE Interlibrary Cooperation and Resource Sharing.
INSTITUTION Office of Educational Research and Improvement (ED), Washington, DC.
PUB DATE 85
NOTE 8p.; In: Annual Report on LSCA Special Activities, FY 1985; see IR 052 014.
PUB TYPE Reports - Descriptive (141)

EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS Annual Reports; *Communications; Data Analysis; *Federal Aid; Library Administration; *Library Cooperation; Library Expenditures; *Library Networks; Program Descriptions; *Shared Resources and Services; Union Catalogs
IDENTIFIERS *Library Services and Construction Act

ABSTRACT

Based on fiscal year 1985 annual reports from 48 states, this report describes interlibrary cooperation and resource-sharing activities supported by Library Services and Construction Act (LSCA), Title III, funds during 1985. A summary of types of activities reported includes the establishment, maintenance, and expansion of communication networks for interlibrary loan and referral services; the establishment and maintenance of computerized holdings lists of serials and monographs using the OCLC online database for bibliographic descriptions; the support of and assistance for libraries that serve as major lenders in the network; the establishment and maintenance of delivery systems to transport library materials; training and continuing education programs for planning and implementing technology-based activities and services; and the provision of library automation consultant services for assistance in planning and designing systems. In addition, excerpts from selected annual reports provide brief descriptions of specific projects in the areas of network management, expanded support of communication networks, delivery systems, support and assistance for libraries that serve as major lenders, continuing education, union catalogs and lists, consultant services, and general network activity. (KM)

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U.S. DEPARTMENT OF EDUCATION

OFFICE OF EDUCATIONAL RESEARCH AND IMPROVEMENT

LIBRARY PROGRAMS

PUBLIC LIBRARY SUPPORT STAFF

Interlibrary Cooperation and Resource Sharing

Fiscal Year 1985

by

Dorothy Kittel

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

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In fiscal year 1985, funds appropriated for Title III were $17,640,000. As in other years, not all of this amount was expended in FY 1985; some funds were carried over for expenditure in FY 1986. The information that follows is based on the Annual Reports for FY 1985 received from 48 States, the District of Columbia, Guam, Puerto Rico and Virgin Islands. Only those activities supported in whole or in part with LSCA Title III funds are included in this report. Therefore, many significant and well-known cooperative library activities will not be part of this report.

The States reported expenditures of $15,251,146 from FY 1984 carryover funds and FY 1985 appropriated funds for Title III activities. These funds were frequently supplemented with funds from State and other sources. However, since Title III does not require the States to match the Federal grant, States are not required to report these funds from other sources.

During FY's 1984 and 1985 the States expended some of their Title III funds to support activities that would lead to more comprehensive planning for interlibrary cooperation and resource sharing. Statewide planning committees and subcommittees, task forces, outside consultants, workshops and conferences were methods used to gain knowledge of the current situation, to explore possible future directions and make recommendations, and to gain consensus for State directions for networking.

Interlibrary cooperation and resource sharing programs carried on by the States are rarely isolated activities. Rather, they are most often projects joined together to form a broader statewide resource sharing program. The types of activities undertaken by the States to enhance resource sharing include:

- establishment, maintenance and expansion of communication networks for interlibrary loan and referral services;
- establishment and maintenance of computerized holdings lists of serials and monographs using the OCLC online database for bibliograhic descriptions;
- support of and assistance for libraries that serve as major lenders in the network;
- establishment and maintenance of delivery systems to transport library materials;

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° training and continuing education programs for planning and implementing technology-based activities and services; and

° provision of library automation consultant services for assistance in planning and designing systems.

Below are excerpts from selected State FY 1985 Annual Reports describing activities under Title III. For additional information and complete reports from all States, readers may contact the appropriate State Library Administrative Agency.

A. Network Management

Connecticut - A seventeen member Connlinet Council was established to provide advice on network development. The Council devised a proposed network which was adopted by the State Library Board in December 1985. The proposal calls for a realignment of existing "network" services (Connecticard and Connecticar) and the creation of new services under a centralized coordinating office in the State Library.

Indiana - A grant to the Stone Hill Area Library Services Authority (SHALSA) provided for the first phase of establishing "The Information Connection: A Model Microcomputer Center System for ALSA." SHALSA assessed needs, established an advisory committee, planned the system and policies, purchased and installed equipment at SHALSA and other ALSAs, designed training and procedures manuals, and evaluated the in-house and resource sharing use. The program objectives were to:

1. Improve member communications through word processing of newsletters, workshop information, etc. 50% complete

2. Implement computer-based financial management systems such as budget and financial records. 50% complete

3. Replace manual membership records systems such as mailing lists and directories in four additional ALSA's. 50% complete

4. Transmit interlibrary communications. 50% complete

5. Collect reliable statistics on interlibrary loans requests and responses. 25% complete

Funds were spent on computer hardware, operating supplies, electronic mail (ALANET) line charges, and training.

Ohio - Planning for Statewide Resource Sharing - Since regionalization will be the basis for statewide resource sharing, an analysis of the current status of regional resource sharing was conducted. Existing automated circulation systems in each region were identified and recommendations were made to further develop and integrate them into the regional system. Recommendations for developing resource sharing capabilities in non-automated libraries were made. Options for including all libraries, both public and private, not currently system members are under study.

B. Expanded Support of Communication Networks

Alabama - Telecommunications equipment was purchased and installed to add new libraries to the Library Management Network (LMN). The network was established in FY 1983. At that time three regional public libraries contracted with CLSI for an automated circulation system among them. Since then the network has expanded to include public, school and academic libraries.

Alaska - An Alaska Library Network Dialogue Network was established and will sponsor three statewide meetings (two via teleconferencing, the third during the Alaska Library Association Conference) to chart the future of the Alaska Library Network.

The State Library continued support of the Western Library Network (WLN) and involved more Alaska libraries in WLN through its blanket membership. It also assisted in the expansion of the Alaska Library Network database through grants to WLN member libraries for retrospective conversion of bibliographic records.

California - The University of California, Division of Library Automation was successful in the first phase of developing procedures to test radio communication of data among libraries by means of packet radio. Consultants have surveyed potential sites between the Bay Area and Sacramento. Network and transport protocols have been selected and frequencies secured within the University of California for experimental use. In the quest of FCC approval of radio frequencies, critical public policy issues have arisen and this demonstration should form the basis for well-informed consideration of the issues. Research and planning have suggested that the economics of wide area packet radio networks for libraries may prove to be attractive in contrast to those of common carrier services.

Illinois - West Central Illinois Library System conducted a telecommunications needs assessment for the West Central Illinois Resource Sharing Alliance. The Lincoln Trail Library System produced tools to evaluate current usage of data communications equipment and services with recommendations on how to determine the most effective models for library networks.

Maine - TALIMAINE (Technical Assistance and Library Information for Maine), a link with over 300 national and international computer-based data files, continued as a source of last resort in subject searches for journal articles, conference papers, patents. The TALIMAINE service has increased at a steady rate as more users become aware of its potential.

New Mexico - Microcomputers and modems were purchased to initiate an electronic mail network involving, initially, eight libraries and the State Library.

New York - A grant was made to the Mid-Hudson Library System to test an electronic mail and information service as a means of improving communications among libraries, library systems and the State Department of Education. NYLINE (the New York Libraryline) is an electronic communications system which is part of the American Library Association's ALANET electronic information service. The project was planned in consultation with State Education Department staff, representatives of library systems and persons knowledgeable about ALANET and other national systems. NYLINE is technically

one subscription for ALANET services which is in effect for a network of library locations. As of April 1985, the following services were made available to NYLINE users on a specially created NYLIN menu:

Electronic mail to all other ALANET users in the U.S. and Canada;

Electronic newsletter produced by N.Y. State Library, NYLINE News;

Electronic bulletin boards, four categories specifically for NYLINE users;

Online instructions;

Online interlibrary loan and photocopy forms;

Online vender order and claims forms; and

Telegram and mailgram interface.

As of September 30, 1985 there were 101 participants in the NYLINE project -- public library systems, regional resource library systems, school library systems, central libraries (excluding systems), and the State Education Department.

Vermont - An electronic mail interlibrary loan system was implemented on microcomputers replacing the fifteen year-old teletype network. The State Library, its five regional libraries, and most of the academic libraries switched to electronic mail by the end of FY 1985. It was apparent by the end of FY 85 that electronic mail is faster, less expensive, and more efficient than teletype or the U.S. Mail.

C. Delivery Systems

Colorado - A feasibility study for establishing an efficient courier system to facilitate the distribution of materials to members of the Pueblo Library District was completed.

Illinois - Projects to improve delivery of resources and information included grants to Carl Sandburg College to expand the facsimile transmission network, the University of Illinois to continue to manage the Intersystem Library Delivery Service, and expand of the ALANET/ILLINET Electronic Mail Project.

Washington - The Materials Delivery Project is a multiyear project which has implemented a daily courier delivery service to 72 academic, community college, public and special libraries via 21 dropsites. It also has installed phone lines and Pitney Bowes 8900 telefacsimile units in ten academic and public libraries in Seattle, Olympia, Spokane and Pullman.

D. Support and Assistance for Libraries that Serve as Major Lenders

Alaska - Fairbanks Public Library - "Free Materials for All Alaskans" is supported by grants to reimburse all libraries for interlibrary loan costs incurred. Fairbanks Public Library acts as the clearinghouse for direct billings and the State Library maintains accounts at the University of Washington and Washington State University.

Colorado - A grant to the Pueblo Library District improved access to public library service in Pueblo County by the purchase and installation of lines, modems, and terminal stations at the Pueblo Library District and the Reference/Interlibrary Loan departments of Pueblo Community College and the University of Southern Colorado.

Indiana - Continued to reimburse the universities for expenses incurred by Ball State University, Indiana University, and Indiana State University in filling requests for other Indiana libraries.

Washington - Reimbursements of significant new lenders provided financial support to those libraries providing a disproportionate share of interlibrary loan materials within the State's resource sharing network. Washington State Library set criteria and established a "loan formula" to determine which libraries were eligible to apply for reimbursement. This project was initiated as a "stopgap" measure to provide the library community time to address the issue. This was the final phase of LSCA Title III funding. The library community's proposed legislation for state aid for libraries contains a provision for reimbursement to net lenders.

E. Continuing Education

Colorado - Training was provided to reference/interlibrary loan staff at Pueblo Community College and the University of Southern Colorado to:

a) formulate and perform effective author/title/subject search strategies;

b) prepare bibliographies on demand; and c) send and receive electronic mail.

Texas - The Texas Association of Developing Colleges undertook the Cooperative Utilization of Library Technology Project, the primary purpose of which was to train academic librarians in database searching in cooperation with special librarians in the Dallas area.

F. Union Catalogs and Lists

Alabama - North Alabama Union List of Serials (NAULS) increased input from additional libraries with the goal of becoming a Statewide union list.

Alaska - The State Library produced and distributed 450 copies of the new edition of the Alaska Library Network fiche catalog to public, academic, special, and school libraries. The number of libraries increased by 134 over FY 1984. The catalog now contains 635,000 titles and 1,272,000 holdings. A new edition of the Audiovisual fiche catalog was also distributed.

Michigan - Northland Interlibrary System continued to work toward the preparation of a COM catalog to facilitate access to library materials for users of all types of libraries. The catalog was distributed in December 1985. For many school library members, this COM introduced microfiche use to students for the first time. High school students and teachers were trained in the use of the COM catalog and the statewide information network to extend their critically short library resources.

New Jersey - The New Jersey Union List of Serials provides any of 225 libraries that receive it with information on 68,444 periodicals and serial publications owned by 63 New Jersey libraries. It includes holdings of nearly 85% of all serial titles owned by New Jersey libraries. Microfiche editions are issued by Rutgers University on a quarterly basis, with partial support from Title III. This support has been primarily in the form of grants for specific additions to the list, both in bibliographic content and in the number of libraries whose holdings were included. While this has increased the value of the list as a location tool, it has made it increasingly cumbersome and expensive to maintain on Rutger's labor-intensive batch system. At this point, plans call for the termination of the Rutgers' contract and the conversion of the list to the OCLC online database.

North Carolina - The State Library continued its subscription to the Southeastern Library Network's (SOLINET) Local Access to and Maintenance of Bibliographic and Data Base Authority System (LAMBDA). This allows online changing and upgrading of the State Library's records in the statewide union database. Also, the State Library began the retrospective conversion of the catalog records of the North Carolina Foreign Language Center. A grant was made to the Cumberland County Library, which operates the Center, for the first phase of the project, which will be completed in the next fiscal year.

Ohio - State Library staff worked with the regional library systems and assisted three regions in planning for the establishement of a union COMCAT which would allow resource sharing among the libraries in the regions. A planning survey in each region revealed that member libraries see a strong need for lateral resource sharing employing automation technology.

G. Consultant Services

Indiana - The Indiana Cooperative Library Services Authority (INCOSLA) received funds to, among other activities, establish a microcomputer lab and equip it with hardware and software, develop workshops in which over 450 individuals were involved, and continue to forward archival tapes of the Indiana database files to SOLINET. It should be noted that FY 1985 was the last year for the positions of Information Retrieval Specialist and Network Secretary funded by LSCA. These positions are now supported with State funds.

New Mexico - The State Library contracted with a consulting firm that designed and conducted a series of two planning retreats and five regional planning meetings to develop a long range statewide plan for library cooperation and resource sharing. Twenty-three recommendations resulted from the planning activity in the areas of public relations, funding, state databases, school libraries, and interjurisdictional relations. Upon acceptance of the final report, the State Library and the New Mexico Library Association will incorporate the recommendations into their work programs for the coming years.

H. General Network Activity

Alabama - The Alabama Library Exchange (ALEX, Inc.) continued to receive funds to build on the established planning, development and operation of the multitype cooperative library system. The significance of the ALEX project includes: its continuing successful demonstration of the overall value of

multitype library cooperation; and the demonstration that multitype systems offer the suitable support mechanisms for interlibrary cooperation and networking. The ALEX Plan of Service is designed to promote better library service through: the development of formal cooperative programs; significantly improved access to library resources; development of bibliographic tools for systemwide location of materials; encouragement of improved collection development practices; improved professional communication and information exchange; and the encouragement of shared applications of various new technologies.